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World Production and Trade

54

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 28-87

July 15, 1987

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

U.S. EXPORT SALES

U.S. Commodity Exports Continue To Strengthen. Sales of corn, grain sorghum, rice and cotton for 1986/87 continue to show improvement, while wheat exports for the 1987/88 marketing year also are up. The following table compares accumulated exports and outstanding sales for similar periods in the 1985/86 and the 1986/87 marketing years as reported under FAS's Export Sales Reporting Program. Data for 1985/86 are as of July 3, 1986, while data for 1986/87 are as of July 2, 1987. Accumulated exports are commodities which have been sold and exported. Outstanding sales are commodities which have been sold but not yet exported.

The 1985/86 data for corn and grain sorghum have been adjusted to include shipments reported during the month of September, so a meaningful comparison can be made. Data are measured in thousand units (metric tons/bales).

Commodity	Year Beginning	Accumulated Exports 85/86	86/87	Outstanding Sales 85/86	86/87
Wheat	June 1	22,314	24,558	-	12,407
Corn	Sept. 1	29,153	32,600	2,923	5,488
Grain Sorghum	Sept. 1	3,936	4,141	875	931
Soybeans	Sept. 1	18,956	17,882	847	2,290
Rice	Aug. 1	1,521	2,247	271	436
Cotton	Aug. 1	1,756	5,826	176	839
New Marketing Year		86/87	87/88	86/87	87/88
Wheat	June 1	2,440	3,352	4,927	8,019

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SALLY KLUSARITZ, Editor, Tel. (202) 447-3448. Additional copies may be obtained from FAS Media and Public Affairs Branch, 5922-S, Washington, D.C. 20250. Tel. (202) 447-7937.

GRAIN AND FEED

JAPAN Reduces Producer Rice Price. Japan has reduced its producer rice price for the first time since 1956. The price for the 1987 crop is 17,557 yen per 60 kilograms (just over \$90 per hundredweight at the current exchange rate of U.S.\$1=147 yen), which represents a reduction of about 6 percent from the 1986 level. The new price is the result of a compromise between the government and representatives from rice-growing constituencies. This reduction means that the producer rice price is now lower than the government resale price for the first time since 1963.

OILSEEDS AND PRODUCTS

TURKEY Revises Import Surcharges. Turkey has reduced its import surcharges on vegetable oils from \$120 to \$70 per metric ton, reportedly to stabilize domestic prices. The change could improve U.S. vegetable oil exports to Turkey. Recently the United States requested a lowering of the \$120 surcharge to bring Turkey's import regime more in line with its obligations under the General Agreement on Tariffs and Trade. Turkey raised import surcharges for pulses, wheat, barley and wheat flour. The increases reportedly are aimed at encouraging consumption of domestic products.

DAIRY, LIVESTOCK AND POULTRY

BRAZIL Suspends Hide Exports. Brazilian exports of hides were suspended for 90 days as a way to stabilize domestic supply and hold down prices, according to the U.S. agricultural counselor in Brasilia. The suspension, which began June 9, primarily will affect exports of wet blues. Since the suspension will increase domestic supplies, Brazil could reduce imports of wet blues from the United States. Through the first half of 1987, the United States had export commitments to Brazil for about 115,000 pieces of wet blues.

Earlier, the Brazilian government limited 1987 hide exports to 3 million pieces. Trade sources report that 30 percent of the quota had been exported by the end of May. Prices for wet blues have declined from 38 cruzados per kilogram to 30 cruzados, and the shoe industry anticipates further declines.

FRUITS

Output of Processing Tomatoes Up in 1987. Total output of tomatoes for processing for the 11 important producing countries is forecast at 15 million tons, about 3 percent above 1986. That total is still well below the peak of 19 million tons reached in 1984. Early forecasts indicate that in 1987, total area for the 11 countries is essentially the same as that of 1986. Many countries continue to report problems with high carryover stocks which are limiting prospects for profitable production.

In the United States, area under contract for processing tomatoes is essentially the same as in 1986. Some improvement in yield is forecast, resulting in a crop of 6.8 million tons, 1 percent larger than in 1986. Contracted area in California is down about 1 percent, but better yields will push production in that state to 5.9 million tons, 1 percent above 1986. Mexico's 1987 harvest is estimated up 23 percent based on both increased area and higher yields.

Production of processing tomatoes in the European Community is forecast to show a modest recovery in 1987 following last year's 20-percent decline. Production in Italy, the largest EC producer, is forecast at 3.2 million tons, slightly below the 1986 level. Area planted is down about 2 percent as growers have shifted to other crops which offer opportunities for more profitable production. Greece, the second leading EC producer, is forecast to harvest 1.2 million tons of tomatoes for processing in 1987, about the same as in 1986. Greece's 1986 output was cut by a sharp drop in planted area and heavy rains which hurt fruit development and quality.

Spain's production of tomatoes for processing in 1987 is forecast at 761,000 tons, 23 percent above 1986. Area planted is up about 5 percent while better supplies of irrigation water and favorable weather are expected to result in higher yields. Portugal's harvest is expected to decline nearly 10 percent as growers adjust to burdensome carry-over stocks of products. French output in 1987 is forecast to total 300,000 tons, 20 percent above 1986 despite some reduction in planted area. Yields in 1986 were sharply reduced by late season rainfall.

In Israel, tomatoes for processing are forecast at 220,000 tons, nearly 20 percent above 1986. All of the increase is due to improved yields which in 1986 were reduced by shortages of irrigation water. In Turkey, 1987 output is expected to total 900,000 tons, more than 25 percent above 1986. Output in 1986 was reduced as the industry attempted to reduce burdensome carry-over stocks of products.

Taiwan's 1987 processing tomato production was hurt by a typhoon that destroyed large areas of newly planted seedlings. Some areas were replanted, but harvested area is still believed to be down sharply. Based on estimated lower area, 1987 production may total 310,000 tons, a sharp decline from 1986.

Processing tomato production, by country, is as follows in thousand metric tons:

Country	1985	Revised 1986	Forecast 1987
United States	6,511	6,707	6,775 1/
Canada	492	475	475
Mexico	250	300	370
Italy	3,785 2/	3,240 3/	3,150
France	392	242	290
Greece	1,650 4/	1,149 5/	1,180
Spain	819	618	761
Portugal	716	545	500
Turkey	1,100	700	900
Israel	257	186	220
Taiwan	362	384	310
Total selected countries	16,334	14,546	14,931

1/ Contract production only.

2/ Includes 800,000 tons withdrawn from the market.

3/ Includes 500,000 tons withdrawn from the market.

4/ Includes about 250,000 tons not delivered to processors.

5/ Includes 200,000 tons withdrawn from the market and 200,000 tons not delivered to processors.

WEEKLY EXCHANGE RATE DEVELOPMENTS

During the week ending July 10, the U.S. dollar rose above 150 yen. This is the first time in three and a half months that the dollar has been at this level. The recent strength has caused speculation that the United States and its major allies might again move to weaken the U.S. currency. As a result, currency traders this past week sold dollars for yen.

Despite this, the dollar closed up for the week against the yen and European currencies helped by administration comments that the recent strength should not pose problems for U.S. industry.

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Currencies	Current rate	----Percent change from----		
	7/9/87	week ago 7/2/87	month ago 6/11/87	year ago 7/86
Argentine Austral	1.7985	3.68%	10.20%	102.76%
Australian Dollar	1.4065	1.34%	.80%	-11.20%
Brazilian Cruzado	44.2100	1.74%	19.61%	220.19%
Canadian Dollar	1.3230	-.62%	-1.31%	-4.13%
South African Rand	2.0449	.20%	2.44%	-19.67%
Thai Baht	25.8200	-.03%	.27%	-1.52%
ECU	.8842	.28%	2.40%	-12.44%
British Pound	.6180	.00%	2.81%	-6.80%
French Franc	6.1275	.40%	2.29%	-11.40%
West Germany Mark	1.838	.35%	2.53%	-14.43%
Japanese Yen	150.000	1.74%	5.30%	-5.11%
South Korean Won	808.900	-.34%	-1.47%	-8.66%
New Taiwan Dollar	31.030	.00%	-.22%	-18.51%

Exchange rates are spot as of 3 p.m. Eastern Time, July 10
Source: FAS Exchange Rate Database and Wall Street Journal

RECENT PAPERS AND PUBLICATIONS

U.S. Proposal for Negotiations on Agriculture under the General Agreement on Tariffs and Trade. FAS has available an information packet on the U.S. proposal for the Uruguay Round of the multilateral trade negotiations. To obtain a copy, write Information Division, FAS, Room 5922-S, USDA, Washington, DC 20250-1000.

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of July 9, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
69. Israel wheat	May 29, '87	200,000	
68. Bangladesh wheat	May 22, '87	100,000	
	July 8, '87	50,000	
67. Soviet Union wheat	Apr. 30, '87	4,000,000	COMPLETE
66. Turkey rice	Apr. 3, '87	70,000	
65. Colombia barley malt	Apr. 3, '87	15,000	
64. Iraq table eggs	Feb. 20, '87	189 million eggs	
63. Canary Islands poultry	Feb. 9, '87	5,000	Sold 1,000
62. Nigeria wheat	Jan. 28, '87	500,000	
61. China wheat	Jan. 26, '87	1,000,000	COMPLETE
60. Iraq wheat	Jan. 16, '87	800,000	Sold 605,000
59. Switzerland barley or sorghum	Jan. 16, '87	250,000	Sold 9,000
58. Poland wheat	Jan. 7, '87	500,000	COMPLETE
57. Poland barley or sorghum	Dec. 31, '86	200,000	Sold 167,000

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

56. Romania wheat	Dec. 23, '86	250,000	
55. Iraq poultry	Dec. 22, '86	60,000	COMPLETE
54. Dominican Republic	Dec. 9, '86	25 million	Sold 11.1
table eggs		eggs	million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000	Sold 6,000
52. Tunisia barley	Dec. 1, '86	150,000	
51. Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates)	Oct. 30, '86	1,500 head	COMPLETE
dairy cattle			
50. West Africa (Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Ghana, Gabon, Liberia, Niger, Togo) wheat	Oct. 30, '86	345,000	Sold 95,750
	June 15, '87	185,000	
49. Dominican Republic	Oct. 29, '86	1,500	Sold 1,133
poultry			
48. Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47. Cameroon wheat flour	Oct. 14, '86	20,000	
46. Romania barley	Sept. 24, '86	200,000	Sold 125,000
45. Venezuela barley malt	Sept. 4, '86	100,000	
44. Cyprus barley	Aug. 26, '86	150,000	Sold 118,000
43. Canary Islands wheat	Aug. 8, '86	100,000	
42. Egypt semolina	Aug. 6, '86	30,000	Sold 23,000
41. Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40. Canary Is. dairy cattle	July 28, '86	3,000 head	Sold 2,825
39. Hong Kong table eggs	July 28, '86	44 million	COMPLETE
		eggs	
38. Senegal wheat	July 17, '86	100,000	COMPLETE
37. India vegetable oil	July 8, '86	25,000	COMPLETE
36. Jordan barley	June 17, '86	60,000	
35. Israel barley	June 17, '86	200,000	Sold 107,324
34. Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33. Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32. Sri Lanka wheat	May 16, '86	125,000	COMPLETE
	March 5, '87	95,000	Sold 85,000
31. Saudi Arabia barley	May 7, '86	500,000	COMPLETE
	Aug. 6, '86	250,000	COMPLETE
	Sept. 16, '86	300,000	COMPLETE
	Oct. 8, '86	200,000	COMPLETE
			(201,000)
	Jan. 5, '87	1,250,000	COMPLETE
	May 15, '87	500,000	COMPLETE
30. Algeria barley	Apr. 17, '86	500,000	Sold 36,000
29. Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28. Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
	June 18, '86	5,000 head	
27. Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
	Sept. 12, '86	10,000 head	Sold 3,411

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

26.	Yemen poultry feed	Apr. 14, '86	150,000	Sold 108,668
25.	Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
		June 24, '86	200,000	COMPLETE
		Oct. 7, '86	500,000	Sold 213,050
24.	Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
		June 18, '87	8,000 head	COMPLETE
23.	Syria wheat	Apr. 8, '86	700,000	CANCELLED
22.	Benin wheat (remaining 15,000 tons transferred to West Africa	Apr. 7, '86	45,000	COMPLETE
21.	Algeria table eggs	Apr. 4, '86	500 million eggs	
20.	Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 2,028
19.	Jordan wheat	Mar. 19, '86	75,000	COMPLETE
		June 20, '86	75,000	COMPLETE
		Dec. 31, '86	225,000	COMPLETE
18.	Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
		Aug. 22, '86	800,000	Sold 300,000
17.	Algeria wheat flour	Feb. 25, '86	100,000	
16.	Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
15.	Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14.	Zaire wheat	Dec. 27, '85	35,000	COMPLETE
		May 15, '86	45,000	COMPLETE
		Oct. 17, '86	40,000	COMPLETE
13.	Nigeria barley malt	Dec. 10, '85	100,000	Sold 55,164
12.	Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
		Jan. 7, '87	175,000	Sold 75,000
11.	Egypt poultry	Nov. 26, '85	8,000	COMPLETE
		Mar. 21, '86	15,000	COMPLETE
		June 18, '86	5,000	COMPLETE
		July 8, '86	15,000	COMPLETE
		Dec. 19, '86	25,000	COMPLETE
		Feb. 27, '87	6,000	
10.	Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
		May 15, '86	30,000	Sold 15,000
9.	Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8.	Jordan rice	Nov. 8, '85	40,000	Sold 38,700
		Jan. 13, '87	60,000	
7.	Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
		May 8, '86	500,000	Sold 248,000
6.	Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
		Dec. 9, '86	790,000	COMPLETE
		July 1, '87	500,000	
5.	Yemen wheat	Sept. 6, '85	100,000	COMPLETE
		Jan. 26, '87	100,000	COMPLETE
4.	Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
		Apr. 14, '86	100,000	COMPLETE
		May 18, '87	100,000	Sold 50,000

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE (512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	COMPLETE
	Oct. 8, '86	1,000,000	COMPLETE
	July 8, '87	500,000	
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 616,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	COMPLETE

EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced as of July 9, 1987

Announced to Date 29,835,680 tons grains and products (grain equivalent)
 758 million table eggs
 140,500 tons frozen poultry
 65,500 head dairy cattle
 25,000 tons vegetable oil

Sold to Date 16,451,309 tons wheat
 1,593,196 tons flour (grain equivalent)
 3,457,324 tons barley
 72,610 tons semolina (grain equivalent)
 106,883 tons barley malt (grain equivalent)
 106,000 tons sorghum
 38,700 tons rice
 108,668 tons poultry feed
 25,000 tons vegetable oil
 130,133 tons frozen poultry
 49,264 head dairy cattle
 54,572,004 table eggs

Total Sales Value: \$2,092.2 million
 Estimated Bonus Book Value: \$1,401.4 million
 Market Value of Awards: \$998.6 million

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Selected International Prices

Item	July 14, 1987		Change from	A year
			a week ago	ago
ROTTERDAM PRICES 1/				
	\$ per MT	\$ per bu.	\$ per MT	\$ per MT
Wheat:				
Canadian No. 1 CWS-13.5%.	141.50	3.85	-2.50	N.Q.
U.S. No. 2 DNS/NS: 14%....	133.50	3.63	-3.50	126.50
U.S. No. 2 S.R.W.	122.00	3.32	-2.00	118.75
No. 3 H.A.D.....	150.00	4.08	-1.00	127.50
Canadian No. 1 A: Durum10/	151.00	4.11	-5.00	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	89.00	2.26	--	96.00
Soybeans and meal:				
U.S. No. 2 Yellow.....	223.00	6.07	-2.45	197.10
Brazil 47/48% Soya Pellets11/	210.00	--	-7.00	187.00
U.S. 44% Soybean Meal..12/	192.00	--	-15.00	178.00
U.S. FARM PRICES 3/				
Wheat.....	86.34	2.35	-0.37	86.34
Barley.....	60.17	1.31	+0.46	56.03
Corn.....	58.66	1.49	-2.36	73.23
Sorghum.....	54.45	2.47 2/	-1.54	71.21
Broilers.....	1,079.15	--	-20.94	1,531.09
EC IMPORT LEVIES				
Wheat 5/.....	197.88	5.39	-3.47	155.46
Barley.....	195.02	4.25	-0.64	161.73
Corn.....	201.41	5.12	+0.78	157.92
Sorghum.....	207.01	5.26	-1.67	166.87
Broilers 4/ 6/ 8/.....	511.00	--	-3.00	348.00
EC INTERVENTION PRICES 7/ 9/				
Common wheat(feed quality)	180.47	4.91	-12.15	170.55
Bread wheat (min. quality)	189.96	5.17	-12.79	179.39
Maize.....	189.96	4.83	-12.79	179.39
Barley and all other feed				
grains, excluding maize.	180.47	--	-12.15	170.55
Broilers 4/ 6/.....	1,562.00	--	-29.00	1,444.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	N.A.	--	--	N.A.
Barley.....	N.A.	--	--	N.A.
Broilers 4/ 6/ 8/.....	415.00	--	-3.00	256.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ September/October shipment. 11/ August/September shipment. 12/ October/December shipment. N.A.=None authorized. N.Q.=Not quoted. Note: Basis July delivery.

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| <input type="checkbox"/> Fruit, Dried | <input type="checkbox"/> Meat, Prepared | <input type="checkbox"/> Vegetables, Fresh |
| <input type="checkbox"/> Fruit, Fresh Citrus | <input type="checkbox"/> Meat, Red | <input type="checkbox"/> Vegetables, Processed |
| <input type="checkbox"/> Fruit, Fresh Non-Citrus | | |

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